

E – GRANT APPLICATION SYSTEM

THE CARL GELLERT AND CELIA BERTA GELLERT FOUNDATION

E - GRANT APPLICATION QUESTIONS

In order to assist you with the submission of a grant request in 2017, we have provided some guidance about our process in how to apply through the E – Grant Application System. You may of course contact us at any time via email at info@gellertfoundation.org or by phone at (650) 985-2080.

- Deadline

- E-Grant Request Application Form

- Full proposal

- IRC 501(c)(3) Tax Exempt Classification

- IRC 509(a)(1), 509(a)(2) Not a Private Foundation / 170(b)(1)(A) Public Charity Classification

- Financial Reporting Documentation

- General

DEADLINE

What is the deadline for delivery of our grant request through the new e-grant application system?

Your grant request, with all required documents, must be received through our online application system no later than Tuesday August 15, 2017.

Is it possible to get an extension to this deadline?

No. In fairness to all applicants, no extensions are granted.

If we submit online all or any part of our request on or prior to August 15, 2017, will that be considered as received on August 15, 2017?

The complete grant request, as outlined in our E-Grant Application System 2017 Guidelines and Submission Requirements, must be received no later than Tuesday August 15, 2017. Due to the high submission of requests on or near the deadline day, only those requests received via online by August 4, 2017 will be reviewed for completeness prior to the actual deadline date of Tuesday August 15, 2017.

If we use a commercial delivery service such as FedEx or UPS and it was picked up for delivery prior to August 15, 2017 will it be considered as received on time if it is not in your office by August 15, 2017?

No. We will **not** accept any hardcopies through FedEx or UPS. All submissions must be submitted through the E-Grant Application System.

If we use a courier or messenger service to deliver the package on or before August 15, 2017 and they do not complete their delivery by August 15, 2017 will that be considered as received in your office?

No. We will **not** accept any hardcopies. All submissions must be submitted through the E-Grant Application System.

Can we save the application and return to it later prior to submission?

Yes. The applicant can save the application and submit it at a later date prior to the deadline. However, once the application has been submitted, no more changes can be made on the application.

I have a question that is not answered in these FAQs. What should I do?

If the answer to your question cannot be found here or in the 2017 Guidelines and Submission Requirements, you may contact Rosa King, Program Officer, or Jack Fitzpatrick, Executive Director at (650) 985-2080 or info@gellertfoundation.org.

E-GRANT REQUEST APPLICATION FORM

What is the process for filling out the Application Form through the E-Grant Application System?

The E-Grant System is comprised of two sections:

- User Registration
- Grant Application

The applicant is the person responsible for completing a grant proposal for the organization. The grant proposal process includes completing an Application Form, including required attachments requested in the form.

IMPORTANT: If you are not a first time user/applicant, proceed to Section II and log on to the E-Grant System.

Section I

User Registration

1. If you are first time applicant in the online application system, the first step is to click on **Create New Account** and create a new account for the nonprofit organization seeking a grant, including the primary contact and the chief executive officer of the organization. A tutorial is available on the Foundation Logon Page, as well as on the Foundation website, www.gellertfoundation.org. There is also an applicant tutorial document, designed to provide applicants with instructions for use of the E-Grant Application System, called Foundant Technologies. This applicant tutorial document is located on the Foundation website at www.gellertfoundation.org.

After you register by creating a new account if you are a first time applicant, proceed to section II, #2. Previous year applicants proceed to section II, #1.

Section II

Grant Application

1. If you have accessed this E-Grant Application before, you will log-in with the SAME email address and password you used previously when creating an account. Click on **Log On** after entering your information. **IMPORTANT:** Your credentials (email and password) do not change unless you change them or ask us to reset them. If you are uncertain of your account status please email Rosa King, Program Officer, at info@gellertfoundation.org or call her at (650) 985-2080 to inquire. It's best to avoid duplication.
2. Choose "Apply" on the navigation menu once you are logged onto the foundation's online grants management system and then click on the blue "Apply" link under "The Carl Gellert and Celia Berta Gellert Foundation Grant 2017" section in order to be directed to the application page.
3. Once on the application page, answer all of the application questions pertinent to your organization and submit the completed application no later than August 15, 2017.

What are some helpful hints in submitting our proposal through the E-Grant Application System?

1. Answer the questions on the form paying close attention to the instructions and **word or character limitations** for each question. It is recommended to prepare longer responses in MS Word, and then cut and paste the information onto the form. Some questions have a character limit that allows only a specific amount of text.
2. Required fields are denoted with an (*). If a required field is left blank on the Application Form, the E-Grant System will not process the request. A dialog box will appear on the screen and list the field(s) that require a response. Fields with missing information will be denoted with "field is required" in red lettering. The system will not allow the Application to be submitted if a required field is left blank.

3. When submitting an application, an applicant can select the button labeled “Submit Application” (when the application is complete), or “Save Application”, giving the applicant the ability to return and complete the form at a later time. After the application is submitted, the applicant will see a Confirmation Page indicating the form has been submitted. Once the application has been submitted, the responses entered into the form fields can no longer be edited. Be sure to make all necessary edits prior to final submission of the application and required documents.

My organization information needs to be updated, but I am unable to update this section. What do I do?

Please email Rosa King, Program Officer, at info@gellertfoundation.org or call her at (650) 985-2080 to inquire about updating your organization’s information.

Can we save the Application Form and return to it at a later time to make edits or do we need to submit the Application Form right away?

Yes, applicants can save an application draft by clicking on the button located at the bottom of the Application Form, labeled “Save Application”. This gives the applicant the ability to return and complete the Application Form at a later time.

Once an Application Form is submitted, can we edit the form fields?

Once an Application Form has been submitted, it can only be viewed and printed by the applicant.

May we recreate this form on our computer?

No. We do not allow recreated or modified Grant Request Application forms.

If one or more of the line items on the Application Form does not apply to our organization, may we leave that item blank or enter “Does Not Apply”?

No. All line items apply to all organizations submitting an Application Form and must be completed in order to be considered.

We applied to your Foundation previously or received a grant from your Foundation. Must we complete another Application form?

Yes. A new Grant Request Application form must be completed each year for the year to which it applies. This year’s form must be submitted through the E-Grant Application System.

May we FAX, e-mail, or mail the Application Form?

No. You must submit your application form, along with your other required documents, according to the guidelines for the E-Grant Application System.

Our Application form was rejected because it was incomplete or not signed. May we submit the Application after August 15, 2017 if we have submitted the remainder of our proposal?

No. All required information, including the electronically signed Application form, must be received in our office no later than Tuesday August 15, 2017.

Does the signature on the Application Form need to be an officer of our organization?

No. Our only requirement is that it is a **typed** signature of a member of your organization who is authorized to sign the request.

Our current organization name differs from our letterhead or Form 990/990EZ/990N. What name should we enter on the Application Form under “Name of Organization Applying for Grant”?

Please enter the current name of your organization and provide documentation FROM the Internal Revenue Service acknowledging the name change.

I have a question that is not answered in these FAQs. What should I do?

If the answer to your question cannot be found here or in the 2017 Guidelines and Submission Requirements, you may contact Rosa King, Program Officer, or Jack Fitzpatrick, Executive Director at (650) 985-2080 or info@gellertfoundation.org.

FULL PROPOSAL

If we have submitted several requests in the past or have been a grant recipient for several years, is it necessary to again provide Items 2.A. and 2.B.?

Yes.

Will you accept a proposal that is more than 5 pages?

We prefer that your proposal **does not** exceed a maximum of 5 pages.

What is an appropriate dollar amount to request in our proposal?

We do not offer recommendations for funding amounts. An applicant should request an amount that they feel is appropriate for their project and organization.

May we submit a request for more than one project or purpose?

No. The Foundation only accepts one request per organization for only one project per year. Since only you know your priorities, we must ask that you choose one project when you submit your request.

I have a question that is not answered in these FAQs. What should I do?

If the answer to your question cannot be found here or in the 2017 Guidelines and Submission Requirements, you may contact Rosa King, Program Officer, or Jack Fitzpatrick, Executive Director at (650) 985-2080 or info@gellertfoundation.org.

501(c)(3) TAX EXEMPT CLASSIFICATION

What does 501(c)(3) mean?

501(c)(3) is a classification issued by the Internal Revenue Service determining that your organization is exempt from filing federal income tax.

If our organization is not 501(c)(3), can we still apply to your Foundation?

No. We only accept requests from organizations that are exempt from filing federal income tax under Section 501(c)(3) of the Internal Revenue Code that are also considered public charities under Sections 509(a)(1), 509(a)(2) and 170(b)(1)(A) of that code.

We are a religious organization covered under a Group Ruling. Does this requirement apply to us?

Yes. Please refer to Item 3(B) on Page 4 of our 2017 Guidelines and Submission Requirements.

We applied to your Foundation previously or previously received a grant from your Foundation. Must we resubmit this 501(c)(3) documentation?

Yes. Due to the volume of requests that we receive each year, we are unable to maintain files for individual organizations.

I have a question that is not answered in these FAQs. What should I do?

If the answer to your question cannot be found here or in the 2017 Guidelines and Submission Requirements, you may contact Rosa King, Program Officer, or Jack Fitzpatrick, Executive Director at (650) 985-2080 or info@gellertfoundation.org.

509(a)(1),(509(a)(2) NOT A PRIVATE FOUNDATION / 170(b)(1)(A) PUBLIC CHARITY CLASSIFICATION

What does 509(a)(1), 509(a)(2) and 170(b)(1)(A) mean?

509(a)(1), 509(a)(2) and 170(b)(1)(A) are classifications issued by the Internal Revenue Service determining that your organization is “not a private foundation” and is a “public charity”.

If our organization is not classified as a public charity under 509(a)(1), 509(a)(2) and 170(b)(1)(A), can we still apply to your Foundation?

No. We will only accept requests from organizations that are classified as public charities under IRS Section 509(a)(1), 509(a)(2) and 170(b)(1)(A) that can provide documentation of such from the IRS.

We are a religious organization covered under a Group Ruling. Does this requirement apply to us?

Yes. Please refer to Item 3(B) on Page 4 of our 2017 Guidelines and Submission Requirements.

We applied to your Foundation previously or previously received a grant from your Foundation. Must we resubmit this 501(c)(3) documentation?

Yes. Due to the volume of requests that we receive each year, we are unable to maintain files for individual organizations.

I have a question that is not answered in these FAQs. What should I do?

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FINANCIAL REPORTING DOCUMENTATION

What do you mean by project budget?

This means a budget for the specific project for which you are requesting funding.

May we submit other financial information in place of a Form 990 or 990EZ?

Only if you are exempt from filing Form 990 and 990EZ or file Form 990N. Please refer to Items 4(C) and 4(D) on Pages 4-6 of our 2017 Guidelines and Submission Requirements.

What do you mean by a complete copy of Form 990/990EZ/990N as submitted to the Internal Revenue Service?

This means an exact copy of the Form 990/990EZ, or 990N filing receipt as it was submitted to the Internal Revenue Service. If you referenced any attachments, statements, schedules, etc. on the Form 990/990EZ itself, those attachments, statements, schedules, etc. must also be submitted. This includes Schedule A and B which are required by the Internal Revenue Service for all 501(c)(3) organizations.

IMPORTANT: Please note that in our experience, many requestors do not take the time to make sure all referenced attachments, statements, and schedules are included with their submission. Unfortunately, this has resulted in incomplete applications that cannot be considered for funding.

The only item(s) missing from our request is/are some of the attachments referenced on our Form 990/990EZ. Will our request be considered in 2017?

No. All required information, including all referenced attachments, must be received in our office no later than Tuesday August 15, 2017 in order to be considered in 2017.

Our organization is not required to file a Form 990/990EZ, but we complete a 990N on line. Does this requirement apply to us?

Yes. Please refer to Item 4(C) on Page 5 of our 2017 Guidelines and Submission Requirements. This item explains acceptable alternatives.

We are a religious organization, exempt from filing Form 990, 990EZ, or 990N. Does this requirement apply to us?

Yes. Please refer to Items 4(A) and 4(D) on Pages 4-6 of our 2017 Guidelines and Submission Requirements for detailed instructions. These items explain the written exemption requirements AND acceptable alternatives to Forms 990/990EZ.

How do we determine our exemption qualification?

Visit the Internal Revenue Service website at www.irs.gov. On the home page, choose the orange box titled "Forms and Pubs". Then choose "Current Forms and Pubs". Scroll down and choose "Inst 990" and go to Page 4. On the right side you will see the heading "B. Organizations Not Required to File Form 990 or 990 EZ".

What should our written exemption include?

Written exemption should be on your letterhead and signed by an officer of your organization stating why you are exempt from filing, according the Internal Revenue Service. Examples would include . . .

Please be advised that ABC School is exempt from filing Form 990, 990EZ, 990N because it is a school below college level affiliated with a church or operated by a religious order.

May a religious order submit “group ruling” documentation to meet the above written exemption requirement?

No. Please do not submit “group ruling” documentation to meet this requirement. Written exemption as outlined in the previous answer applies to religious organizations also.

We applied to your Foundation previously or previously received a grant from your Foundation. Must we resubmit written exemption again?

Yes.

If our organization is exempt from filing Form 990 and 990EZ, should we send other financial information?

Detailed instructions and requirements for acceptable alternatives to a Form 990 and 990EZ may be found under Items 4(A), 4(C), AND 4(D) on Pages 4-6 of our 2017 Guidelines and Submission Requirements. These alternatives are only acceptable if you are exempt from filing Form 990/990EZ **AND** have provided us with a written explanation of exemption as outlined in Item 4(D) on Pages 5-6 of our 2017 Guidelines and Submission Requirements.

We are a branch of a larger organization. The main office files one Form 990 for all branches. Should we submit additional financial information applicable to our specific location?

IMPORTANT: Yes. In addition to the main organization’s Form 990, please submit the information detailed in the 2017 Guidelines and Submission Requirements in Items 4(A) AND 4(D)(2) for your location.

The most current financial information we have available is from 2014 and more current information will not be available until after August 15, 2017. May we submit the most current information when it is available even if that is after the deadline date?

We would appreciate this supplemental information. However, you are still required to provide the most current information outlined in Item 4 of our 2017 Guidelines and Submission Requirements no later than Tuesday August 15, 2017 for your request to be considered.

I have a question that is not answered in these FAQs. What should I do?

If the answer to your question cannot be found here or in the 2017 Guidelines and Submission Requirements, you may contact Rosa King, Program Officer, or Jack Fitzpatrick, Executive Director at (650) 985-2080 or info@gellertfoundation.org.

GENERAL

If we forget our password, how do we access the E-Grant Application Form?

Please go to the Logon Page and click on “Forgot your Password?” This will allow you to reset your password after you enter the email address you use to login and click on the “Send Reset Link” button.

I am unaware of my organization’s account status and am unsure if we already have an account. What do I do?

If you are uncertain of your account status please email Rosa King, Program Officer, at info@gellertfoundation.org or call her at (650) 985-2080 to inquire. It's best to avoid duplication.

How do we sign out of the E-Grant System?

Go to your contact name in the top right-hand corner of the website screen, and click on “Sign Out”.

What happens if I do not have access to a scanner? How do I upload my documents to the computer, then the online grants management system?

Applicants have the option of using a tool called “Fax to File.” This is a tool that applicants most commonly use to convert files that they maybe have only in paper copy to an electronic version. Most commonly applicants can use this feature if they do not have a scanner. Here are some instructions for using the tool “Fax to File”:

1. To start, click the **Fax to File** link on the left hand side of the screen, underneath “tools”, once logged on to the online grants management system.
2. Then click the **Request a Fax#** button and you will be presented with a toll-free fax number.
3. You have this number for 20 minutes.
4. Fax your document to the number provided.
5. Send a separate fax for each document and do not include a cover sheet.
6. All faxed documents will be automatically converted to .pdf format.
7. You have 20 minutes to fax your documents before the number expires.
8. After you have faxed each separate document click the **Finished Faxing** button to see your list of files.
9. Download your converted documents to your computer and save them.
10. Upload the documents to the appropriate questions on the online form.

What do I do if the file I want to upload in the attachment section of the grant application is bigger than the allowed file size for an attachment?

If needed, please use this tool to compress large PDF files: <http://compress.smallpdf.com/>

Do you require a Letter of Inquiry?

No, we do not require a Letter of Inquiry.

How do I obtain application guidelines?

The 2017 Guidelines and Submission Requirements may be viewed/printed from our website on the home page (www.gellertfoundation.org), requested by us via email at info@gellertfoundation.org, or by calling (650) 985-2080.

What should my proposal include?

Proposals should include **all** the required items listed in our 2017 Guidelines and Submission Requirements.

How many copies of the full proposal do you need?

One copy only, please.

Do you make grants to individuals?

No. The Foundation only makes grants to tax-exempt organizations which qualify as public charities.

Do you make grants to fiscal sponsors?

No, we do not grant to fiscal sponsors.

What types of organizations or projects do you fund?

The “Grant Recipients” section of our website lists organizations, projects, and award amounts for our 2016 grant cycle.

What geographic areas do you fund?

The Foundation’s geographic restrictions are to organizations located within the 9 counties of the greater San Francisco Bay Area – Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma.

May we contact The Foundation to insure our request was received and/or is complete?

Due to the high volume of requests received, The Foundation responds in writing and/or by email to all inquiries and requests. You will be notified in writing that (1) your request is complete and will be considered in 2017, (2) requires additional information to be submitted no later than the deadline of August 15, 2017, or (3) was incomplete at deadline and cannot be considered in 2017. Every attempt is made to provide this communication to you within 1 week of receipt.

When may we expect a response to our request?

Board decisions are made annually. Written notification of Board decisions is made to all applicants in late December.

What are the chances of receiving a grant?

A large number of worthy organizations approach The Foundation for support. The process is highly competitive. Even if a project fits within The Foundation's guidelines, it will not necessarily be funded.

Is there a form to use for progress or follow up reports?

No. There is no standard report form. Narrative and financial descriptions of how grant funds were spent should be submitted through our online application system.

If your organization receives a grant, please login into the online portal through the foundation website to view the grant report follow-up(s) assigned to you. Click on "Access the E-Grant Application System Here" in order to be guided to the foundation online logon page. You will log-in with the same email address and password you used previously. Click on Log On after entering your information. Your credentials do not change unless you change them or ask us to reset them.

On your "Dashboard", underneath the "requests" section, you will find the follow-up form(s) assigned to you. In the "Edit/View" section, click on "Edit". In the "Question Group" section click on "Upload a file" underneath "Upload Report" when ready to upload your report. In order to submit your report, click on "Submit Follow Up".

Why was our request denied? Can we speak with someone to obtain specific reasons?

The application process is competitive. The Foundation receives many more requests than it is able to fund and must often make difficult decisions in the allocation of grants. It is our policy not to furnish specific reasons as to why any organization was not selected for a grant.

What mailing address do I include in the "Your Contact Information" section of the registration process?

Please include the organization's mailing address where you would like to receive any communication from The Carl Gellert and Celia Berta Gellert Foundation. All communication will be sent to this mailing address, including awarded grant checks.

I have a question that is not answered in these FAQs. What should I do?

If the answer to your question cannot be found here or in the 2017 Guidelines and Submission Requirements, you may contact Rosa King, Program Officer, or Jack Fitzpatrick, Executive Director at (650) 985-2080 or info@gellertfoundation.org.